

CALIFORNIA STATEWIDE REFERENCE: PROPOSED DESIGN DESCRIPTION

Introduction

This document is a narrative description of a proposed model for statewide reference service in California. Additional background papers and slide presentations leading up to this point can be found on the California State Library's web page at <http://www.library.ca.gov/html/lds.cfm>.

Currently, the reference structure supported by the state includes the CLSA regional reference programs, the AskNow virtual service, and database subsidies. The proposed model will facilitate future data-driven customer services. This model changes the structure for service as well as the process for determining services.

Background

In August 2006 the California State Librarian hired Ruth Metz Associates, Portland, OR to design a statewide reference model. The prescribed specifications of the model were:

- Efficient and cost effective
- Statewide in scope
- Serves California residents
- As flexible as possible, to lend itself to the dynamic technology and the public's response to it
- Something the public sees as an extension of their local public library
- Suited to the information consumer of today and tomorrow
- Available through a variety of media (e.g. instant messaging, e-mail, telephone, etc.)
- Includes a strong document delivery component
- Provides a sustainable system of information delivery
- Employs access and referral protocols that will work in today's and tomorrow's world

Additionally, the model should:

- Include the following components:
 - Next-level reference service for local public libraries
 - Virtual reference
 - Database support
- If possible, build on the best elements of the current structure for question handling and improve upon it
- If possible, work within the existing CLSA legislation

- Be financially sustainable.

The proposed model has the potential to meet all of the stated specifications, position California to create a premiere service for its residents, and advance 21st century state-of-the-art reference services. It refocuses current resources toward the desired results. It provides the impetus for a much desired transformation that under effective leadership, the California Library community can get behind.

Description of the Model

The proposed model provides a single point of entry for CLSA 2nd level questions and the AskNow general public reference service. This single virtual reference portal receives questions from the general public and librarians. Document delivery and databases support the service. Questions are handled by CLSA reference personnel, supplemented as need with contract personnel and services. Other data-driven services are developed. A project manager implements operations, manages the transition, leads the research and development agenda, and develops the model to its next form.

Single Portal

Initially, the main service of the proposed model is a single virtual portal for the California public and for California librarians' questions. Questions that now are handled by California's virtual service, AskNow, will be handled through this portal. Likewise, questions that are now referred from local public libraries to CLSA reference centers will also be handled through this portal.

These questions will be handled in "sessions" by the CLSA reference centers' staff, virtually. That is, they will be handling client questions and conducting client sessions from their present locations. The current practice of using "stringers" to search certain libraries or to provide subject expertise continues to be an option. Additional staffing hours can be added as volume may demand. The idea is to increase the demand, if possible, through consistently good service and effective marketing and publicity.

The public and librarians will be able to submit questions by a variety of means: telephone, email, text messaging, instant messaging, and so forth. OCLC's QuestionPoint software is the product in current use for logging and tracking the AskNow questions. At least initially, the portal will use the same software for tracking all questions and sessions. Transcripts of the sessions will be produced for quality verification.

The Project Manager and CLSA systems will work together to make the portal operational by early 2008. This will include making a plan for the use of reference staff, creating protocols for triaging questions, establishing performance standards for handling sessions, and structuring data and quality systems for the service.

Single CLSA Reference Plan of Service

The Project Manager will work with CLSA system administrative councils and staff to transition from individual system reference service plans to a single reference plan of service for Californians. The single plan of service and budget for 2008/2009 should be ready for submission to the California State Library by Spring 2008.

Understandably, the first six months of the 2007/08 fiscal year will be a challenging transition period. During this time, system reference centers will be participating in the set up of a single portal and preparing to staff it beginning in early 2008. They will be transitioning from business as usual to the new model. Invariably, there will be functions they perform in their systems that compete for their time. Likewise, the reference allocations will have been planned already for the fiscal year. The allocation patterns may be well established.

The Project Manager will assist the CLSA system coordinators in identifying and cataloging these activities, functions, and allocations for review by CLSA system administrative councils and State Library staff in early 2008. The State Library will provide allocation parameters to the Project Manager for preparation of the 2008/2009 reference plan of service.

Management

The transitional model operates under a Project Manager advised by a leadership advisory team. The Project Manager implements the operations, manages the transition, and oversees the research and development aspect of the project.

Leadership

The project leadership advisory team includes State Library and CLSA system representatives and a few expert advisers: academic research, market research, public relations, and funding partnerships. The leadership team advises the Project Manager on:

- research and development agenda
- public relations
- advocacy and funding partnerships
- integration of product and service innovations and improvements based on data
- analysis of product and service effectiveness

The leadership advisory team may change according to the needs of the project.

Desired Results

The desired results of this model are four:

- Better understanding/incorporation of user needs, preferences, and behaviors into the service plan and budget.

- Quality improvement of all facets of the reference service, especially:
 - Evaluation, i.e., data, metrics, value for decision-making
 - Effective communication and relationship-building
 - Marketing and public relations
- Development in a Web 2.0-and-beyond environment
- Service development for Californians informed by market research, including focus on high profile targets; for example, English language learners, print-impaired, child development, gang prevention, health and wellness.

Transition to a Customer-Centered Model

The proposed model cultivates the State Library's capacity to nimbly create an evidenced-based package of services for Californians. The service providers will become adept at focused, ongoing market research, clarifying a service niche, and properly packaging services that are consumer-viable at any given time. Service choices will be data-driven and emphasize customer-centered outcomes. Performance will be consistently professional and based on professional judgment rather than rigid procedures. Information will be usable by the consumer: customized, personalized, and collaborative. Services will allow customers to be independent.

How to Get There

Start by analyzing whether state funding of CLSA reference could support the proposed model. Think in terms of a 3-4 year time horizon. Start the transition with CLSA systems at the beginning of the FY 2007-2008. If possible, use the CLSA reference allocation for the transitional operations, supplemented by LSTA funding. Use LSTA funding for the research and development agenda. Bring partner funding into the research and development agenda as soon as possible.